

## Against the Grain

---

Volume 20 | Issue 5

Article 13

---

November 2008

# WorldCat Selection: A Shorter, Smoother Path from Selection to User Access

Kay Covert

OCLC Marketing, [covertk@oclc.org](mailto:covertk@oclc.org)

Brad Gauder

OCLC Marketing, [gauderb@oclc.org](mailto:gauderb@oclc.org)

Follow this and additional works at: <https://docs.lib.purdue.edu/atg>



Part of the [Library and Information Science Commons](#)

---

### Recommended Citation

Covert, Kay and Gauder, Brad (2008) "WorldCat Selection: A Shorter, Smoother Path from Selection to User Access," *Against the Grain*: Vol. 20: Iss. 5, Article 13.

DOI: <https://doi.org/10.7771/2380-176X.5191>

This document has been made available through Purdue e-Pubs, a service of the Purdue University Libraries. Please contact [epubs@purdue.edu](mailto:epubs@purdue.edu) for additional information.

ingly vast majority of the world's documented intellectual output (what the **Berkeley** study called "new, stored information") is going to exist in the world only temporarily, and will eventually disappear permanently. This is no one's fault. It's simply the reality of a world where creating and distributing information has recently become easy and cheap while organizing and archiving information permanently remains difficult and expensive.

2. As librarians, we must set priorities ruthlessly. Knowing that we can't keep and care for everything that deserves to be kept and cared for, we have to reallocate staff time to the care of those documents that deserve it most and dispassionately take staff time away from objects and processes that deserve it even a little bit less.

3. Bearing in mind how tiny is the fraction of information over which we can actually exercise stewardship, we should rethink the principles we use to set those priorities. How can we tell whether a document contributes substantially to our institutional mission? What makes a document more worthy

of preservation than another one? Or, more to the point for each of us, what makes a document more worthy of *my staff's time* than another one? The documents that deserve it most may or may not be the ones we consider "best" — they are those that most effectively meet the needs of our patrons and help the library advance the priorities of the community it serves.

4. We must largely (though not completely) let go of our boutique model of both collecting and preserving. It's easy to leaf through a publisher's catalog and find titles that look interesting. It's easy to decide that the damaged book I see in front of me right now deserves to be repaired. It's hard even to comprehend, let alone honestly confront, the huge and growing opportunity cost imposed by directing time to those activities.

I realize that this whole column tends to conflate the issues of preservation and collection development. But that's partly because the connection between them is so intimate. Preservation is basically the enforcement arm of collection development — it's the mechanism by which we make our collecting decisions stick. Decisions about collection development are necessarily preservation decisions, and vice versa.

I also realize that I haven't exactly proposed a real solution to the problem of preservation in an environment of overwhelmingly explosive information growth. Ultimately, there may not be a solution. We may eventually have to let go of the whole idea of the library as a permanent repository, and flip the traditional collection model: instead of investing primarily in permanent collections, focus more on providing an effective portal to everything that's available at a given moment. Not even the **Library of Congress** can handle everything that it really ought to. Why do we continue pretending that it — let alone the rest of us — can? 🌱

#### Endnotes

1. **University of California, Berkeley School of Information Management and Systems**, "How Much Information? 2003," October 27, 2003. <http://www2.sims.berkeley.edu/research/projects/how-much-info-2003/execsum.htm> (accessed October 16, 2008).
2. **OCLC**, "Libraries: How They Stack Up." 2003. <http://www5.oclc.org/downloads/community/librariesstackup.pdf> (accessed October 16, 2008).
3. **Anderson, Rick**. "On Knowing the Value of Everything and the Cost of Nothing." *Against the Grain* 18, no. 6 (2007): 44-45.

## WorldCat Selection: A Shorter, Smoother Path from Selection to User Access

by **Kay Covert** (OCLC Marketing) <covertk@oclc.org> and **Brad Gauder** (OCLC Marketing) <gauderb@oclc.org>



**P**aper slips that pile up or get misplaced — searching multiple vendor sites over and over — lacking information on what other libraries own — for many libraries, these conditions characterize their selection and acquisition processes.

Thanks to a software development project initiated at **Cornell University Library** in Ithaca, New York, and developed further by **OCLC**, libraries now have a way to modernize and streamline those often tedious selection and acquisitions duties. It's called **WorldCat Selection**, and it's available to libraries of any size or type.

Several years ago, staff at the **Cornell University Library** undertook a software development project to help streamline the labor-intensive selection and ordering process — and reduce the inefficiency inherent in learning and using multiple online systems. The result was the **Integrated Tool for Selection and Ordering at Cornell University Library**, or "ITSO CUL."

The goals of **ITSO CUL** were to assist library staff with the selection and ordering pro-

cess; and bring together into one interface new publication records from materials vendors, the library's profile and MARC records from the **Library of Congress**. In 2006, **Cornell** began working with a team from **OCLC** to further the development of **ITSO CUL**, and late that year, **OCLC** introduced **WorldCat Selection**.

### "Paper Shuffling that Took Too Much Time"

The challenges inherent in a paper-based system for the selections and acquisitions were largely behind decisions that the **McGill University** library system and the **Getty Research Institute (GRI)**, Research Library in Los Angeles made to implement **WorldCat Selection**.

**McGill University**, based in Montréal, has 13 libraries in its system, and **Joseph Hafner**, Associate Director, Collection Services, would be among the first to admit that a 13-library system can generate a lot of paper slips in selection and acquisition workflows.

"We were using several vendors — and were still receiving paper slips from our European vendors," explains **Hafner**. "These slips had to be sorted to determine the se-

lector to which each belonged before they could go to our acquisitions team.

"The acquisitions staff then had to look online for corresponding records of the new items, and if none existed, they had to enter new records. It all amounted to a lot of rekeying and paper shuffling that took too much time."

According to **Ann Roll**, Acquisitions Librarian, the Research Library at the **GRI** was balancing slips from its acquisitions vendors in both paper and electronic form. "This was difficult to facilitate," notes **Roll**, "and slips often went unreviewed. We also saw an increase in slips from our European vendors — their allocations for books were being spent more quickly due to their favorable exchange rates."

Meanwhile, interest in what **Cornell** was doing prompted **Princeton University**, in Princeton, New Jersey, to pursue **WorldCat Selection**, as it offered a way to work with **Library of Congress** resource file data more effectively.

*continued on page 56*

"We wanted to be able to receive **LC** resource file data for our collections development staff and automate record transfer from multiple sources into our acquisitions systems," explains **Katharine Farrell**, Head, Order Division and Assistant Head Tech Services at **Princeton's Firestone Library**. "We wanted this particularly for our materials from our Western European vendors, and since we knew about **ITSO CUL** from our colleagues at **Cornell**, we thought that **WorldCat Selection** would be a great way to pull it all together."

### **"What I've Had in Mind for a Long Time"**

**WorldCat Selection** allows selectors of new library materials to view notification records from multiple materials vendors in one central comprehensive system. The service makes it easier for libraries to get **WorldCat** records for newly selected materials into their integrated library system earlier in the technical services process.

**Hafner** says that centralization was key to **McGill's** decision to implement **WorldCat Selection**. At **McGill**, some selectors use just one vendor, but those who select for subjects like law, medicine and international economics order from multiple vendors, and history selectors use all of **McGill's** materials vendors. "**WorldCat Selection** offered an opportunity to centralize everything into one net," he says.

"Our librarians told us they'd like to have just one source to search, and now they can move electronic slips easily. Also, library holdings information is accessible in **WorldCat Selection**, so it's easy to see what libraries already own materials that **McGill** wants to buy," **Hafner** explains.

It was the estimated time savings for **McGill's** acquisitions team that ultimately sold the library's director and associate directors on **WorldCat Selection**. According to **Hafner**, the decision also involved input from the head of cataloging, a selector coordinator, an acquisitions coordinator, a senior liaison librarian and a systems librarian.

**Roll** says that the Research Library at the **GRI** chose **WorldCat Selection** to streamline both the selection and firm order processes. This ensures that the slips are reviewed and enables acquisitions staff to place orders faster.

It also allows the slips to be distributed to

### **How WorldCat Selection Works**

1. Your library profiles with your materials vendors to determine the notification items you want to receive.
2. Materials vendors inform **OCLC** of notification items for your library based on the frequency you determine.
3. **OCLC** loads the items for your library into **WorldCat Selection**.
4. Selectors log into **WorldCat Selection** to view notification items for their collection areas, viewing records from multiple vendors in one system.
5. Selectors take actions such as *select*, *reject*, *forward to another selector* or *defer*.
6. Acquisitions staff export all selected records from all selectors and all vendors, load them into your ILS and complete the order electronically from the ILS.

more than one bibliographer. "This has worked very well for the bibliographer for our Conservation Collection, which has very interdisciplinary and esoteric content," notes **Roll**.

**Princeton's Farrell** notes that when she first learned about **WorldCat Selection**, she thought to herself, "Yes, that's what I've had in mind for a long time."

**Farrell** believes that **WorldCat Selection**, with the **LC** resource file, is a smart choice for a large research library like **Princeton's** because it enables library staff to see available items that are unavailable through their major vendors. "In an average week we place a couple of hundred orders through **LC** resource files that are completely outside the net of our current vendors," she says.

While the need to send items via paper slips or select items in multiple vendor systems is eliminated with **WorldCat Selection**, libraries retain control of the selection process. The service also accommodates the export of **MARC** records from **WorldCat** into integrated library systems, eliminating the need to search and rekey data one record at a time or import data from multiple vendors.

**Farrell** notes that **WorldCat Selection** helps **Princeton** accomplish its goal of 'grabbing the best record as early as possible' in the technical services workflow. Acquisitions staff can take these records and put them into the acquisitions system to place electronic orders more efficiently.

### **"Pretty Straightforward" Implementation**

**Roll**, **Farrell** and **Hafner** all report smooth implementations of **WorldCat Selection**, aided by training opportunities and ongoing support. At the Research Library at the **GRI**, two training sessions helped prepare the selectors to use

the service. Authorization set-up was also part of the start-up there.

"In setting up the authorizations, we first followed the model that we have used for reviewing approval books, matching each language-specific vendor to a single selector," says **Roll**. "As we continued, we took greater advantage of the distribution features [in **WorldCat Selection**] and created more authorizations with more specific criteria."

When **Princeton** implemented **WorldCat Selection** in August 2007, it "shut off" its use of paper slips, according to **Farrell**. "Even though **OCLC's** online documentation is very well-done, helpful and context-sensitive, we still had lots of questions," she says. "Our contacts at **OCLC** were all very responsive to these questions."

**Hafner** reports that **McGill's** implementation in spring 2008 didn't take much time to set up and was "pretty straightforward." **McGill** held a one-hour training session using the online **WorldCat Selection** tutorial for its liaison librarians whose vendor data was available in the service at implementation. According to **Hafner**, this training will be repeated for appropriate staff as the vendors they use are added to **McGill's** implementation of **WorldCat Selection**.

### **"Closer to the Front of the Line"**

Institutions including **Princeton**, the Research Library at the **GRI** and **McGill** are realizing significant efficiencies and cost savings through their use of **WorldCat Selection** without having to rethink their selection and acquisitions processes.

According to **Farrell**, **Princeton's** 30 or so selectors agree that **WorldCat Selection** speeds workflows significantly. "Even our selectors for our humanities collections, who managed paper slips quite efficiently, have agreed that **Selection** makes things go faster overall.

"A few of our selectors have noted that **WorldCat Selection** makes it impossible to let orders pile up because otherwise, they clog up your inbox. They are no longer sorting paper and having it pile up — and we're saving money because it used to take half an FTE to sort the paper slips."

**Roll** notes that at the Research Library at the **GRI** the notification records are being reviewed more often, which enables their collection development team to refine their vendor profiles. "It also ensures that we're not missing titles that would have come on our approval plans prior to the dollar's fall."

### **Participating WorldCat Selection Vendors**

**Currently participating vendors include:** Aux Amateurs de Livres International, Blackwell Book Service, Casalini Libri, China National Publishing Industry Trading Corporation, Coutts Information Services, Harrassowitz, Jean Touzot Librairie Internationale, Leila Books, Lindsay & Croft and YBP Library Services.

In addition, distribution of currently cataloged titles from the **Library of Congress** is available through **WorldCat Selection**.

**Future vendors include:** China Educational Publications Import and Export Corp., East View Information Services, Erasmus Boekhandel BV, Howard Karno Books, Iberbook Sanchez-Cuesta, S.A., Librairie Erasmus, Puvill Libros and Susan Bach Books.

*continued on page 58*



## Director, The Sage Colleges

by **Katina Strauch** (Editor, *Against the Grain*) <kstrauch@comcast.net>

**ATG:** Tell us about the Sage Colleges. There are three of them I believe. How many libraries?

**KG:** The Sage Colleges is a complex institution, offering degrees from associates thru the doctoral level to 2000 students, enrolled in four colleges on two campuses in Albany and Troy, NY. The colleges are **Russell Sage College for Women, Sage College of Albany, Sage Graduate School, and Sage After Work.** The latter three are coed. We have a library on each campus.

**ATG:** Tell us about the library(ies). Number of items? Electronic resources? Budget? Staff?

**KG:** The Libraries are considered one unit with two service points. The holdings

are around 175 thousand volumes. We offer dozens of databases, and some 50 thousand electronic subscriptions. The overall budget is \$1.5 million. The staff is comprised of nine FTE librarians (eight w/faculty status), two paraprofessional, ten hourly staff, and 20-25 student assistants. The libraries are open a combined 172 hours per week.

**ATG:** You attend the Charleston Conference regularly. Hope you will attend this year?

**KG:** The budget for administrative travel was eliminated this year, so I'll miss Charleston this time around.

**ATG:** Tell us about yourself: background and education? I know that you went to Dickinson College and majored in Geology and History.

**KG:** Dickinson, B.S. 1971; University at Albany, M.L.S. 1972. Professional academic library experience at **Union College** (Schenectady), 1975-77, **Rensselaer Polytechnic Institute**, 1977-85, and at **Sage**, since 1985.

**ATG:** We are intrigued by your "furniture" of books. We understand that you are a furniture/antique collector as well?

**KG:** I don't collect furniture; I restore it. I have had a side business

doing that since 1980. I saw a photo in **LJ** a few years ago of some furniture made out of books in a library in the Midwest (Kansas City?). A couple of days later, I walked by our mothballed **NUC** set, and a light bulb went off: what perfect building blocks! 800-some volumes, all the same size and color! Soon after, I set about building loveseats in each building. The line also includes coffee and end tables (Books sitting on wooden legs). The volumes in the loveseats and coffee tables are held in place with 2-sided tape. The end tables stay together with hanger bolts and cap nuts thru 1/4" holes in the corners of the volumes. Like any building project, you have to improvise, so other withdrawn books are fitted in where necessary. We've gotten a lot of positive feedback from members of the college community on the **NUC** furniture. I am available for consultation on making furniture out of books.

**ATG:** What are your other hobbies/whatever?

**KG:** My wife of 35 years and I have a cottage in the 1000 Islands (St. Lawrence River), where I play golf, fish and putter. We live 20 miles south of Albany in an 1882 farmhouse on 3+ acres, where I ply my furniture restoration business, grow vegetables, and try to keep the house from falling down. I also have a 1910 Brunswick pool table, which I enjoy playing on when it isn't covered with stuff. 🌿



### WorldCat Selection from page 56

At **McGill**, it's too soon for a fair assessment of cost and time savings since implementation was recent, but **Hafner** anticipates these savings will be realized. **WorldCat Selection** is freeing up time for **McGill's** acquisitions staff who no longer need to rekey and search for records again, because that part of the work is done for them. "There's always a MARC record available to download," he says.

**WorldCat Selection** is also making the selection process easier for **McGill's** liaison librarians, who can link from the service to vendor sites to get more information when needed. And with vendor information getting into the Acquisitions system faster, materials are ordered and available to users faster.

**Farrell** is pleased with the time savings at **Princeton**. "WorldCat Selection shortens the time from selection to expenditure and cuts four to five weeks out of the order process," she explains. "This keeps many orders from going to back-order because it helps put **Princeton** closer to the front of the line when materials are ordered."

And at **Cornell**, where **WorldCat Selection** began as **ITSO CUL**, the big question from colleagues at peer institutions is whether **Cornell** really saved \$100,000 in staff costs using **WorldCat Selection**. **Scott Wicks**, Associate University Librarian for Central Library Operations tells them, "It's only half true."

**Wicks** explains that yes, **Cornell** did save that much in staff costs, but as new vendors that **Cornell** uses come on board with **WorldCat Selection**, the labor-intensive firm order process becomes more and more automated and the savings continue to grow. "So yes, we did save \$100,000 initially, but we save that and more every year."

### Getting Started with WorldCat Selection

The **WorldCat Selection** Web site at [www.oclc.org/selection](http://www.oclc.org/selection) contains training materials and documentation to help libraries implement the service and get started using it. Training materials are organized by activity — selector, acquisitions staff and administrator — and include tutorials and guides, quick reference and set-up guides. Phone support is also available from **OCLC** regional service providers and **OCLC** support. 🌿

### Rumors from page 14

**Speaking of research**, I never got around to posting on the **ATG News Channel** information regarding **Peter Schilling's IT Index**. **Amherst College** enrolled 438 first-year students this fall, for a total student population of 1680 plus. Schilling gathered some statistics to tell the story of the changes occurring with the students at the College. There's not enough room to publish the whole list, but here are a few "interesting," or should I say "surprising" or "revealing." Statistics. a) Number of students in the class of 2012 who brought desktop computers to campus: 14. b) Total number of students on campus this year that have landline phone service: 5. This is just the tip of the iceberg. [www.academiccommons.org/commons/essay/it-index](http://www.academiccommons.org/commons/essay/it-index)

And, speaking of the **Charleston Conference** — how many of you noticed the **Swets Out of the Box Scholarship Competition**? We got many excellent entries and settled on a winner — **Hana Levay** <levay@u.washington.edu> and a runner-up, **Helen Heinrich** <helen.heinrich@csun.edu>. Like I said, there were lots of great essays and we had trouble settling on one! We will be publishing the essays in a forthcoming issue of **ATG** and on the **ATG News Channel**! Thanks to **Swets** and **Christine Stamison** <cstamison@us.swets.com> for funding this fantastically unique scholarship. I hope this continues year-to-year! And, did you know that, like me, **Christine**, has a Greek background? Yassou!

continued on page 82